



Microsoft Dynamics™ CRM

Workflow Designer Wireframes

February 27, 2019

Prepared for: CRM User Experience, Planning & Program
Management Teams

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Version 14.4 Scenario II

CRM User Experience



Scenario 2

Sales Manager Task



“Whenever a Lead’s priority is HIGH and the lead’s rating is HOT, I would like to be NOTIFIED via an e-mail”

Microsoft CRM 3.0 - Microsoft Internet Explorer

File New Go To Tools Help User: Garner (MBS), Dave

New Record Advanced Find

Sales

- Leads
- Opportunities
- Accounts
- Contacts
- Competitors
- Products
- Sales Literature
- Quotes
- Orders
- Invoices
- Quick Campaigns

Leads

Look for: Find View: Open Leads

New Create Quick Campaign Workflow More Actions

Name	Topic	Status Reason	Created On
test	test	New	12/19/2005 3:45 PM
Stenerson, Derik	Product A	New	10/31/2005 10:40 AM
Stenerson, Julie	Product B	New	10/31/2005 10:40 AM
last	AARDVARK	New	10/30/2005 3:50 PM
last, first	topic	New	10/30/2005 10:05 AM
last	my test subject	New	10/10/2005 4:11 PM
Kelleran, Jeff		New	09/14/2005 9:11 AM
Wu, Peter	CRM 3.0 Overview Presentation	New	07/14/2005 2:03 PM
Test, Bob	Platform and Forms Solution	New	07/05/2005 12:12 PM
HOLYFIELD	TEST LEAD	New	06/30/2005 12:59 PM
Dogfood test tead, Dogfood test tead	Dogfood test tead	New	06/27/2005 5:38 PM
asda	asdas	New	06/27/2005 9:32 AM
Flintstone, Fred	My topic has a first name	Contacted	02/09/2005 2:23 PM
Braddock, Ben	Trade Show Visit	New	09/30/2004 1:46 PM
doe, john	test lead	New	09/29/2004 3:09 PM

1 of 15 selected.

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Done Local intranet

Microsoft CRM 3.0 - Microsoft Internet Explorer

User: Garner (MBS), Dave

File New Go To Tools Help

New Record Advanced Find

Sales

Leads

Leads Opportunities Accounts Contacts Competitors Products Sales Literature Quotes Orders Invoices Quick Campaigns

Look for: Find View: Open Leads

New Create Quick Campaign Workflow More Actions

Create Workflow... Edit Workflow... Run Workflow... Import Workflow... Export Workflow...

Name	Topic	Status Reason	Created On
test	test		12/19/2005 3:45 PM
Stenerson, Derik	Prod		10/31/2005 10:40 AM
Stenerson, Julie	Prod		10/31/2005 10:40 AM
last	AAR		10/30/2005 3:50 PM
last, first	topic	New	10/30/2005 10:05 AM
last	my test subject	New	10/10/2005 4:11 PM
Kelleran, Jeff		New	09/14/2005 9:11 AM
Wu, Peter	CRM 3.0 Overview Presentation	New	07/14/2005 2:03 PM
Test, Bob	Platform and Forms Solution	New	07/05/2005 12:12 PM
HOLYFIELD	TEST LEAD	New	06/30/2005 12:59 PM
Dogfood test tead, Dogfood test tead	Dogfood test tead	New	06/27/2005 5:38 PM
asda	asdas	New	06/27/2005 9:32 AM
Flintstone, Fred	My topic has a first name	Contacted	02/09/2005 2:23 PM
Braddock, Ben	Trade Show Visit	New	09/30/2004 1:46 PM
doe, john	test lead	New	09/29/2004 3:09 PM

1 of 15 selected.

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Done Local intranet

Workflow: New

- Microsoft Internet Explorer

File Actions Help

Save and Close

Activate Workflow

Deactivate Workflow

Workflow: Workflow Rule -Scenario 2

Details:

Information

Workflow:

Workflow Instances

General

Notes

Administration

Name:

Workflow Rule - Scenario 2

Entity

Lead

Workflow Steps

Step 1: Select the event triggering this workflow

Add Event

Step 2: Define the steps of the workflow

Add Step

Status: Enabled

Done

Local intranet

Workflow: New

Microsoft Internet Explorer

File Actions Help

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Deactivate Workflow

Details:

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Name: Workflow Rule - Scenario 2

Entity: Lead

Workflow Steps

Add Event Wizard - Internet Explorer

Getting Started

Step 1 of 3: Start from a template for from a blank workflow

Select starting point for workflow

Start from a template:

Manage new leads

Retire old leads

Create a workflow template

Start from a blank workflow

Help

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Next >

Cancel

Status: Enabled

Done

Local intranet

Workflow: New - Microsoft Internet Explorer

File Actions Help

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Details:

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Name: Workflow Rule - Scenario 2 Entity: Lead

Workflow Steps

Step 1: Select the event triggering this workflow

Add Event Wizard - Internet Explorer

Workflow Type

Step 2 of 3: Select which type of workflow to be created

Select the type of workflow to be created

- ☒ Create a workflow which runs all of the time (Automatic)
- ☐ Create a workflow which only runs when requested (On-Demand)

Help < Back Next > Cancel

Status: Enabled

Done Local intranet

Workflow: New

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Name:

Workflow Rule - Scenario 2

Entity

Lead

Workflow Steps

Step 1: Select the event triggering this workflow

Add Event - Internet Explorer

Triggering Event

Step 3 of 3: Select an event upon which the workflow will execute

Select the event which will trigger the workflow to be executed

Whenever a new Lead is created

Whenever an existing Lead is assigned

Whenever the status changes for an existing Lead

Whenever an existing Lead is updated

Whenever an existing Lead is deleted

Whenever an existing Lead is merged

Help

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Finish

Cancel

Status: Enabled

Done

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Name:

Workflow Rule - Scenario 2

Entity

Lead

Workflow Steps

Step 1: Select the event triggering this workflow

Add Event - Internet Explorer

Triggering Event

Step 3 of 3: Select an event upon which the workflow will execute

Select the event which will trigger the workflow to be executed

☒ Whenever a new Lead is created
 ☐ Whenever an existing Lead is assigned
 ☐ Whenever the status changes for an existing Lead
 ☒ Whenever an existing Lead is updated
 ☐ Whenever an existing Lead is deleted
 ☐ Whenever an existing Lead is merged

Help

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Finish

Cancel

Status: Enabled

Done

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Details:

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Name:

Workflow Rule - Scenario 2

Entity

Lead

Workflow Steps

Step 1: Select the event triggering this workflow

Add Event

Step 2: Define the steps of the workflow

Add Step

Status: Enabled

Done

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Workflow: New - Microsoft Internet Explorer

File Actions Help

Save and Close Activate Workflow Deactivate Workflow

Details:

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General Notes Administration

Name: Workflow Rule - Scenario 2 Entity: Lead

Workflow Steps

Step 1: Select the event triggering this workflow

Add Step Wizard - Internet Explorer

Select Type of Step

Add actions & conditions or add actions only to this step

Actions and conditions make up the logic of a workflow. Actions create or change records in CRM. Conditions check to see if certain criteria are met before executing an action.

☒ Add condition(s) and action(s) to this step
(Example: Check to see if a Lead's Rating is Hot, then Notify me via an Email)

☐ Add actions only to this step
(Example: Create a new Task)

Help < Back Next > Cancel

Status: Enabled

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Name:

Workflow Rule - Scenario 2

Entity

Lead

Workflow Steps

Step 1: Select the event triggering this workflow

Add Step Wizard - Internet Explorer

Add Conditions

Configure the conditions by which will determine when and how the rule will be processed

Define the argument of the condition:

Condition	Record & Attribute	Comparison	Value
☒ Check If	Lead	<Owner>	Equals

Condition Preview

Add more conditions

Remove condition

Advanced...

Help

< Back

Next >

Cancel

Status: Enabled

Done

Local intranet

Workflow: New - Microsoft Internet Explorer

File Actions Help

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Name:

Workflow Rule - Scenario 2

Entity

Lead

Workflow Steps

Step 1: Select the event triggering this workflow.

Add Step Wizard - Internet Explorer

Add Conditions

Configure the conditions by which will determine when and how the rule will be processed

Define the argument of the condition:

Condition	Record & Attribute	Comparison	Value
☒ Check If	Lead Priority	Equals	High

Condition Preview

Check to see if a new lead priority equals high.

Add more conditions

Remove condition

Advanced...

Help

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Cancel

Status: Enabled

Done

Local intranet

Workflow: New

- Microsoft Internet Explorer

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Name:

Workflow Rule - Scenario 2

Entity

Lead

Workflow Steps

Step 1: Select the event triggering this workflow.

Add Step Wizard - Internet Explorer

Add Conditions

Configure the conditions by which will determine when and how the rule will be processed

Define the argument of the condition:

Condition	Record & Attribute	Comparision	Value
☒ Check If	Lead Priority	Equals	High
☒ Check If	Lead <Owner>	Equals	

Condition Preview

Check to see if a new lead priority equals high.

Add more conditions

Remove condition

Advanced...

Help

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Status: Enabled

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Administration

Name:

Workflow Rule - Scenario 2

Entity

Lead

Workflow Steps

Step 1: Select the event triggering this workflow.

Add Step Wizard - Internet Explorer

Add Conditions

Configure the conditions by which will determine when and how the rule will be processed

Define the argument of the condition:

Condition	Record & Attribute	Comparison	Value
☒ Check If	Lead Priority	Equals	High
☒ Check If	Lead Rating	Equals	Hot

Condition Preview

Check to see if a new lead priority equals high and check to see if a new lead rating equals hot

Add more conditions

Remove condition

Advanced...

Help

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Cancel

Status: Enabled

Done

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 Deactivate Workflow

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Name:

Workflow Rule - Scenario 2

Entity

Lead

Workflow Steps

Step 1: Select the event triggering this workflow

Add Step Wizard - Internet Explorer

Add Actions

Select the actions which will be executed when the trigger event and conditions (if present) are met.

Configure the action(s) for the step below:

Then..	...Using...	...In this configuration.
☒ Create a...	...new Task.	Configure Action...

Add more actions

Remove Action

Help

< Previous

Next >

Cancel

Status: Enabled

Done

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Insert a slide with the choices in the drop down

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- Microsoft Internet Explorer

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Details:

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Name:

Workflow Rule - Scenario 2

Entity

Lead

Workflow Steps

Step 1: Select the event triggering this workflow

Add Step Wizard - Internet Explorer

Add Actions

Select the actions which will be executed when the trigger event and conditions (if present) are met.

Configure the action(s) for the step below:

Then..	...Using...	...In this configuration.
☒ Create a... Create a... Make changes to... Notify via.. Call extensions... Stop workflow processing	...new Task.	Configure Action...

Add more actions

Remove Action

Help

< Previous

Next >

Cancel

Status: Enabled

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Deactivate Workflow

Details:

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Workflow Instances

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Name:

Workflow Rule - Scenario 2

Entity

Lead

Workflow Steps

Step 1: Select the event triggering this workflow.

Add Step Wizard - Internet Explorer

Add Actions

Select the actions which will be executed when the trigger event and conditions (if present) are met.

Configure the action(s) for the step below:

Then..	...Using...	...In this configuration.
☒ Notify via...	...E-mail	Configure Action...

Add more actions

Remove Action

Help

< Previous

Next >

Cancel

Status: Enabled

Done

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Workflow: New - Microsoft Internet Explorer

File Actions Help

E-mail: New - Microsoft Internet Explorer

File Actions Help

Save & Close Cancel

E-mail: New

E-mail Attachments

From Kevin Cc
 To Kevin Bcc
 Subject Notification: New Lead for {Account:Account Name; Default Value}

B *I* U

{Lead {!Lead: Name; Default Value}} has created with an estimated revenue of {!Lead: Est. Revenue}. |

Regarding
Owner Kevin
 Duration 30 minutes Priority Normal
 Due
 Category Sub-Category

Status: Draft
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Form Assistant
 Dyanmic Fields: Lead
 Owner
 Address 1: Address Type
 Address 1: County
 Address 1: Fax
 Address 1: Latitude
 Address 1: Longitude
 Address 1: Name
 Address 1: Post Office Box
 Address 1: Shipping Method
Tips
 To add dynamic text fields from a CRM record, select a record type and click a data field to insert.

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- Microsoft Internet Explorer

File Actions Help

Save and Close

Activate Workflow

Deactivate Workflow

Details:

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Workflow:

Workflow Instances

General

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Administration

Name:

Workflow Rule - Scenario 2

Entity

Lead

Workflow Steps

Step 1: Select the event triggering this workflow.

Add Step Wizard - Internet Explorer

Add Actions

Select the actions which will be executed when the trigger event and conditions (if present) are met.

Configure the action(s) for the step below:

Then..	...Using...	...In this configuration.
☒ Notify via...	...E-mail (Notification:....)	Configure Action...

Add more actions

Remove Action

Help

< Previous

Next >

Cancel

Status: Enabled

Done

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Deactivate Workflow

Details:

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Workflow Instances

General

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Name:

Workflow Rule - Scenario 2

Entity

Lead

Workflow Steps

Step 1: Select the event triggering this workflow.

Add Step Wizard - Web Page Dialog

Step Summary

The following Conditions & Actions will be added to the Step.

Step Summary:

Conditions	Actions
IF Lead Priority is Equal to High AND IF Lead Priority is Equal to Hot	THEN Notify via E-mail (Notification:....)

To complete this step, click Finish. To change the Actions or Conditions of this step, click Back.

Help

< Back

Finish

Cancel

Status: Enabled

Done

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Workflow: New

Microsoft Internet Explorer

File Actions Help

Save and Close

Activate Workflow

Deactivate Workflow

Details:

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Workflow:

Workflow Instances

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Administration

Name:

Workflow Rule - Scenario 2

Entity

Lead

Workflow Steps

Step 1: Select the event triggering this workflow

Add Event

TRIGGER EVENT: Automatically execute this workflow whenever a new Lead is created and whenever a Lead is updated.

Step 2: Define the steps of the workflow

Add Step

CHECK IF [Lead Priority is High] AND [Lead Rating is Hot]

THEN Notify By Email: 01043 Notification: New Lead...

Status: Enabled

Done

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Workflow: New

- Microsoft Internet Explorer

File Actions Help

Save and Close

Activate Workflow

Deactivate Workflow

Details:

Information

Workflow:

Workflow Instances

General

Notes

Administration

Name:

Workflow Rule - Scenario 2

Entity

Lead

Workflow Steps

Step 1: Select the event triggering this workflow

Add Event

TRIGGER EVENT: Automatically execute this workflow whenever a new Lead is created and whenever a Lead is updated.

Step 2: Define

Add Step

CHECK

THEN

Status: Enabled

Done

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Internet Explorer

This workflow has not been activated yet.

If you would like to save and activate workflow this workflow now, click Yes.

If you would like to save the workflow but activate this workflow later, click No.

Yes

No

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Microsoft CRM 3.0 - Microsoft Internet Explorer

File New Go To Tools Help User: Garner (MBS), Dave

Sales Leads

Leads

Look for: Find View: Open Leads

New [Icons] Create Quick Campaign Workflow More Actions

Name	Topic	Status Reason	Created On
test	test	New	12/19/2005 3:45 PM
Stenerson, Derik	Product A	New	10/31/2005 10:40 AM
Stenerson, Julie	Product B	New	10/31/2005 10:40 AM
last	AARDVARK	New	10/30/2005 3:50 PM
last, first	topic	New	10/30/2005 10:05 AM
last	my test subject	New	10/10/2005 4:11 PM
Kelleran, Jeff		New	09/14/2005 9:11 AM
Wu, Peter	CRM 3.0 Overview Presentation	New	07/14/2005 2:03 PM
Test, Bob	Platform and Forms Solution	New	07/05/2005 12:12 PM
HOLYFIELD	TEST LEAD	New	06/30/2005 12:59 PM
Dogfood test tead, Dogfood test tead	Dogfood test tead	New	06/27/2005 5:38 PM
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Flintstone, Fred	My topic has a first name	Contacted	02/09/2005 2:23 PM
Braddock, Ben	Trade Show Visit	New	09/30/2004 1:46 PM
doe, john	test lead	New	09/29/2004 3:09 PM

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Appendix

Supporting UI Snapshots

Workflow: New

- Microsoft Internet Explorer

File Actions Help

Save and Close

Activate Workflow

Deactivate Workflow

Details:

Information

Workflow:

Workflow Instances

General

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Administration

Name:

Workflow Rule - Scenario 2

Entity

Lead

Workflow Steps

Step 1: Select the event triggering this workflow

Add Event

TRIGGER EVENT: Automatically execute this workflow whenever a new Lead is created and whenever a Lead is updated.

Step 2: Define the steps of the workflow

Add Step

CHECK IF [Lead Priority is High] AND [Lead Rating is Hot]

Add more conditions...

Add sub-condition...

Add branch condition...

Modify condition...

Remove condition...

Status: Enabled

Done

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Workflow: New

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File Actions Help

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Deactivate Workflow

Details:

Information

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Workflow Instances

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Name:

Workflow Rule - Scenario 2

Entity

Lead

Workflow Steps

Step 1: Select the event triggering this workflow

Add Event

TRIGGER EVENT: Automatically execute this workflow whenever a new Lead is created and whenever a Lead is updated.

Step 2: Define the steps of the workflow

Add Step

CHECK IF [Lead Priority is High] AND [Lead Rating is Hot]

Add condition

Modify condition...

Remove condition...

Condition (If)

Nested condition (Else If)

Branched condition (Furthermore If)

Status: Enabled

Done

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Workflow: New

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Name:

Workflow Rule - Scenario 2

Entity

Lead

Workflow Steps

Step 1: Select the event triggering this workflow

Add Event

TRIGGER EVENT: Automatically execute this workflow whenever a new Lead is created and whenever a Lead is updated.

Step 2: Define the steps of the workflow

Add Step

CHECK IF [Lead Priority is High] AND [Lead Rating is Hot]

THEN Notify By Email: 01043 Notification: New Lead...

Add more actions...

Modify action...

Remove action...

Status: Enabled

Done

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Workflow: New - Microsoft Internet Explorer

File Actions Help

Save and Close Activate Workflow Deactivate Workflow

Details:
Information
Workflow:
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General Notes Administration

Name: Workflow Rule - Scenario 2 Entity: Lead

Workflow Steps
Step 1: Select the event triggering this workflow
Add Event
TRIGGER EVENT: Automatically execute this workflow whenever a new Lead is created and whenever a Lead is updated.
Modify event...
Step 2: Define the steps of the workflow
Add Step
CHECK IF [Lead Priority is High] AND [Lead Rating is Hot]
THEN Notify By Email: 01043 Notification: New Lead...

Status: Enabled

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Workflow: New

File Actions Help

Save and Close

Details:

Information

Workflow:

Workflow Instance

Advanced Conditions - Web Page Dialog

Advanced Condition Configuration

Add complex conditional statements and/or configure condition relationships & groupings

Add complex conditional statements

Step 1. Select the type of condition:

Check if this condition is true

Step 2. Configure the arguments of the condition:

If the...

Record Type: Lead

Record Attribute: Owner

Is...

Equals

The following value...

Fixed Value:

Dynamic Value:

Record Type: Entity

Record Attribute: Attribute

Step 3. Add the condition to the step:

Condition Preview

Add

Condition relationships & grouping

A step can contain multiple conditions. Conditions can relate to one another as an And or as an Or statement. And statements require all conditions to be met, whereas an Or statement requires any of the conditions to be met. Statements may also be grouped.

	Conditions	Relationship
☐	If Lead Priority Equals To High	...Or...
☐	If Lead Rating Equals Hot	

Group...

Ungroup...

Remove...

Help

Done

Cancel

Help

< Back

Next >

Cancel

Status: Enabled

Done

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